Sales Standard Operating Procedure

Department: Sales | Version: [1.0]

Document ID: [SOP-DEPT-###] | Effective Date: [MM/DD/YYYY]

1. Purpose

This Standard Operating Procedure establishes guidelines for sales operations to ensure consistent sales methodology, accurate pipeline management, and achievement of revenue targets.

2. Scope

This procedure applies to all sales personnel including sales representatives, account executives, sales managers, and business development staff.

This procedure applies to:

- Sales Development Representatives (SDRs)
- Account Executives (AEs)
- Sales Managers and Directors
- Business Development Representatives
- Sales Operations staff

Exclusions:

[Describe any activities, processes, or personnel NOT covered by this SOP]

3. Definitions

The following terms have specific meanings within this procedure. Defined terms are capitalized when used throughout this document.

Term	Definition
ACV	Annual Contract Value - yearly value of a subscription/contract
MQL	Marketing Qualified Lead - prospect meeting

	marketing engagement criteria
Pipeline	Sum of potential revenue from all active sales opportunities
SQL	Sales Qualified Lead - prospect verified and accepted by sales team
TCV	Total Contract Value - full value of a multi-year contract
Win Rate	Percentage of opportunities that result in closed-won deals

4. Responsibilities

The following roles and positions have specific responsibilities for this procedure:

Role/Position	**Responsibilities**
[VP of Sales]	Will set sales strategy, quotas, and territory assignments
[Sales Manager]	Will coach team members, conduct pipeline reviews, and approve discounts
[Account Executives]	Will manage full sales cycle from qualified lead to close
[SDRs/BDRs]	Will prospect, qualify leads, and schedule meetings for AEs
[Sales Operations]	Will maintain CRM hygiene, reporting, and process documentation

5. Sales Process

5.1 Lead Qualification (BANT)

1. Review lead source and all available information in CRM
2. Conduct discovery call within 24 hours of lead assignment
3. Apply BANT criteria: Budget, Authority, Need, Timeline
4. Update lead status in CRM immediately after qualification

5. Convert qualified leads to opportunity stage with complete data

6. Return unqualified leads to marketing with reason code

5.2 Opportunity Management

- Create opportunity record with complete and accurate information
- Set pipeline stage based on objective buyer engagement criteria
- Update close date and deal value as new information emerges
- Document ALL customer interactions as activities in CRM
- Maintain minimum 3x pipeline coverage to quarterly quota
- Update opportunities before every pipeline review meeting

5.3 Deal Stages and Criteria

Stage	Probability	Entry Criteria	Required Activities
Prospecting	10%	Initial contact made	Research complete, first outreach sent
Qualification	25%	BANT confirmed	Discovery call completed, needs documented
Proposal/Demo	50%	Solution presented	Demo delivered, proposal sent
Negotiation	75%	Terms being discussed	Pricing approved, contract sent
Closed Won	100%	Contract signed	Handoff to implementation complete
Closed Lost	0%	Deal lost	Loss reason documented, debrief complete

6. CRM Usage Guidelines

6.1 Data Entry Standards

- All leads must be entered or updated within 24 hours of receipt
- Opportunities require complete contact and company information

- Activity logging required for ALL customer touchpoints (calls, emails, meetings)
- Notes must include summary, next steps, and action items with dates
- Pipeline updates due before weekly forecast meetings (Friday COB)

6.2 Required Opportunity Fields

Item	Completed	Notes
Company name, industry, and employee count	☐	
Primary contact: name, title, email, phone	☐	
Lead source (marketing campaign, referral, etc.)	☐	
Estimated deal value: ACV and TCV if multi-year	☐	
Expected close date (must be realistic)	☐	
Current stage and associated probability	☐	
Next step with specific action and date	☐	
Competitors involved (if known)	☐	

7. Lead Scoring Criteria

Score leads using the following criteria to prioritize sales outreach:

7.1 Demographic Score (0-50 points)

Criteria	Points	Scoring Guidelines
Company Size	0-15	1-49 employees: 5 | 50-500: 10 | 500+: 15
Industry Match	0-15	Secondary market: 5 | Primary target: 15
Title/Role	0-10	Influencer: 5 | Decision Maker:

		10
Geography	0-10	Outside territory: 0 | In territory: 10

7.2 Behavioral Score (0-50 points)

Criteria	Points	Scoring Guidelines
Website Visits	0-10	1-3 pages: 3 | 4-10 pages: 7 | 10+ pages: 10
Content Downloads	0-15	Each gated asset downloaded: 5 points
Email Engagement	0-10	Opens: 2 each | Clicks: 5 each
Demo/Meeting Request	15	Automatic 15 points if requested

7.3 Score Thresholds and Response

- 0-30 points (Cold): Marketing nurture only, no sales outreach
- 31-60 points (Warm): SDR outreach within 48 hours
- 61-80 points (Hot): Priority SDR outreach within 24 hours
- 81+ points (Urgent): Immediate AE engagement required

8. Commission Structure Template

The following commission structure template applies to quota-carrying sales roles. Actual rates to be determined by Sales Leadership.

8.1 Base Commission Rates

Quota Attainment	Commission Rate	Accelerator
0-50%	[X]% of ACV	N/A
51-100%	[X]% of ACV	1.0x
101-150%	[X]% of ACV	[X]x accelerator
>150%	[X]% of ACV	[X]x accelerator

8.2 Special Performance Incentives

Incentive Type	Criteria	Bonus Amount
New Logo Bonus	First deal with new customer	$[Amount]
Multi-Year Deal	Contract term >1 year	[X]% of Year 2+ value
Strategic Product	Includes target SKU/product	[X]% additional commission
Quarterly Kicker	Achieve 100% of quarterly quota	$[Amount]

9. Pipeline Review Checklist

Complete the following checklist before weekly pipeline/forecast meetings:

Item	Completed	Notes
All opportunities have activity logged within last 7 days	☐	
Close dates reflect realistic, buyer-confirmed timelines	☐	
Deal values based on confirmed scope and requirements	☐	
Next steps documented with specific actions and dates	☐	
Stalled opportunities identified (no activity >14 days)	☐	
Commit vs. upside deals clearly categorized	☐	
Closed Lost opportunities have documented loss reasons	☐	
Pipeline coverage at minimum 3x quota (by stage weighting)	☐	

9.1 Pipeline Health Metrics

Metric	Target	Current	Variance

Pipeline Coverage (weighted)	3x quota		
Average Deal Size	$[Target]		
Win Rate	[X]%		
Average Sales Cycle (days)	[X] days		
Forecast Accuracy	>85%		

10. Emergency and Exception Procedures

10.1 Emergency Response

In case of emergency, follow the procedures below. Safety of personnel takes priority over all other considerations.

1. Ensure immediate safety of all personnel in the area
2. Contact emergency services if required (911 or local emergency number)
3. Notify supervisor/manager immediately
4. Follow facility emergency evacuation procedures if applicable
5. Document the incident using the Incident Report form

10.2 Exception Handling

When standard procedures cannot be followed due to unusual circumstances:

1. Assess the situation and identify the specific deviation required
2. Obtain verbal approval from [Supervisor/Manager] before proceeding
3. Document the exception, including justification and approver
4. Complete the Exception Request Form within 24 hours
5. Submit for formal review during the next scheduled procedure review

WARNING: Exceptions should only be made when necessary and must be properly documented. Repeated exceptions may indicate the need for procedure revision.

11. Related Information

The following documents and references relate to this procedure:

Category	Reference
Related Policies	Sales Compensation Policy, Discount Approval Policy, Travel and Expense Policy
Related SOPs/Procedures	SOP-SALES-002 Quote to Cash, SOP-SALES-003 Discount Approval, SOP-SALES-004 Territory Management
Related Forms	Opportunity Qualification Form, Deal Desk Request Form, Commission Dispute Form
External References	CRM User Guide, Sales Playbook, Competitive Battle Cards

12. Document Control

SOP Owner	[Sales Operations Manager / VP Sales]
Approved By	[Chief Revenue Officer / VP Sales]
Contact Email	[salesops@company.com]
Contact Phone	[(XXX) XXX-XXXX]
Review Schedule	Quarterly or upon changes to sales methodology, compensation, or go-to-market strategy

13. Revision History

Document all revisions to maintain a complete audit trail:

Version	Date	Changes
1.0	[MM/DD/YYYY]	Initial release

14. Authorization and Approval

Name	Role	Signature	Date

	Prepared By		
	Reviewed By		
	Approved By		

15. Documentation of Training

I have read and understand the content of this Standard Operating Procedure. I have received training specific to the procedures, hazards, and emergency protocols described herein.

Note: All personnel who will perform tasks covered by this SOP must sign below prior to conducting any work. Additional signature pages may be attached as needed.

Printed Name	**Signature**	**Date**
[Manager/Supervisor]		

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